Planning Tools/Templates

Team Temperature Check

Team Temperature Check – questionnaire can be used with remote teams to gauge levels of well-being and team morale.

Temperature check	
Please rate on a scale of 1 (low) to 10 (high), your:	**Score**
Satisfaction with the current working arrangements	☐
Current perception of how well we operate as a team	☐
Current personal level of morale	☐
Current level of personal well-being at work	☐

One person's 8 may be another person's 6 – perception can affect these results so it is clear to understand the individual and track their results over time.

Self-assessment for Remote Working

Use the following self-assessment to identify what you are doing well and what you can improve when managing remotely.

When managing remotely…	Yes	No	In need of improvement
I am aware of my organisation's policy on flexible working			
I am confident when managing by outcomes			
I provide regular feedback to my team			
I hold regular one-to-ones			
I ensure team meetings are held face-to-face as well as virtually			
I proactively build trust and team cohesion			
I encourage informal social interaction with my team			
I recognise individual and team achievement			
I encourage each member of my team to create a personal development plan			
I promote self-care and well-being among the team			
I regularly undertake a team temperature check			

Balancing Work and Home Life

Adapted from Making a Success of Managing and Working Remotely by Sarah Cook

Tips on Effective Time Management

Unless you are clear about what you need to achieve and have a degree of self-discipline, it is difficult to manage your time and achieve your deliverables. Both the team member and the manager have a responsibility to discuss and agree key outputs and outcomes for the role. Regular one-to-ones and catch-ups should help establish priorities.

Typically, when working remotely, the volume of email traffic that you receive increases. It is essential, therefore, that you are able to prioritize effectively. There are two elements to consider in relation to each task or activity:

- URGENCY in relation to TIME
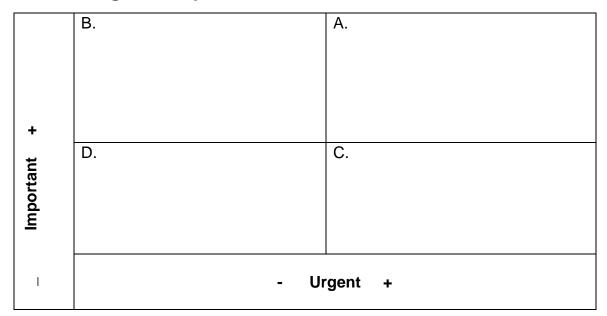- IMPORTANCE in relation to ORGANIZATIONAL NEED

You can classify tasks into four categories:

A. Urgent and important
B. Important but not urgent
C. Not important but urgent
D. Not important and not urgent
- A category A. task (urgent and important) could, for example, be an email that needs to be sent to a key client and has to reach them today. Do these tasks straight away, and if you have more than one, prioritize them – A1, A2, A3, etc.
- A category B. task (important but not urgent) could be a report that you need to prepare and complete by next week. Add these tasks in your diary so that you have enough time to do them and they don't all become As.
- Category C. tasks are not important but urgent, such as confirming a room for a meeting you are having later today. Although it is tempting to focus on Cs, do them quickly or delegate the tasks and make sure that you achieve your As!
- Category D. tasks (not important and not urgent) are not linked to your objectives and are things you really do not need to do. For example, attending a suppliers' drinks reception or a meeting where you don't really need to be present. Either dump or delegate your Ds!

Importance versus urgency

Adapted from Making a Success of Managing and Working Remotely by Sarah Cook

	+ IMPORTANT −	
+	B. Important but not urgent	A. Urgent and important
−	D. Not important and not urgent	C. Not important but urgent

−   URGENT   +

Adapted from Making a Success of Managing and Working Remotely by Sarah Cook

Important vs Urgent Template

	B.	A.
+ **Important**	D.	C.
I	**-** **Urgent** **+**	

One habit we have is to overestimate how much time we have each day to achieve tasks. We also tend to make long lists of things to do and end up not achieving many. It is better to concentrate on a few critical tasks each day rather than more less important ones. Ensure you complete at least one of these key tasks a day. Say to yourself: "Whatever happens today, I will get this one job done."

If you have a long list of tasks:

- Allocate each task a priority – A, B, C, or D according to each item's urgency and importance;
- Allocate an order of priority to each of the As, Bs, Cs and Ds – e.g. A1, A2, A3, A4 etc.;
- Work through all the As, then the Bs, then the Cs, etc.; and
- Where new tasks appear, slot them into your ranking.

Adapted from Making a Success of Managing and Working Remotely by Sarah Cook

The OATS Principle

Using the OATS principle can help you be more realistic about the time you have each day/week to achieve desired outputs.

O	Objectives – what do I want to accomplish today/this week?
A	Activities – What do I have to do to achieve my objectives?
T	Time – How long will it take to perform these activities? How long have I got?
S	Schedule – Place each of the activities in sequence. Focus on urgent tasks.

OATS Principle Template

Project Title	
O	
A	
T	
S	

Adapted from Making a Success of Managing and Working Remotely by Sarah Cook

Self-Care

To ensure well-being, be aware of the common burnout symptoms. Look at the list below and check any that relate to you in the past month:

Self-care Checklist

Weight loss/gain	☐
Tense posture	☐
Trembling	☐
Increased smoking/cups of coffee	☐
Pallor/blushing	☐
Inarticulate speech	☐
Sighing	☐
Colds or infections	☐
Tearful	☐
Frowning	☐
Taking unprescribed drugs	☐
Twitches, tics	☐
Not sleeping well	☐
Dropping things	☐
Forgetting things	☐
Biting nails, lip or cheek	☐
Wanting more time to yourself	☐
Eating too much/too little	☐
Late for work, long lunch breaks	☐
Clock watching	☐
Reduction in output	☐
Making mistakes	☐

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Having aches and pains	☐
Losing temper, mood swings, overreacting	☐
Withdrawing socially	☐
Failure to meet deadlines	☐
Feeling sick	☐
Expecting yourself to do more/better	☐
Feeling angry, hurt, worried, unhappy	☐
Having minor accidents	☐

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